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- TCI buys out Liberty Communications stock
- Rogers and UACC divide cable venture
- Early returns on 'Pirates' sales
- CablePAC nets $52,198 in 1982 campaign

# CableVision

The news and features weekly of the cable television industry February 21, 1983 $3.00

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**CableVision** February 21, 1983. Volume 8, Number 24

Between the lines/5
CableScope/9
Newswire/10
Update/13
Leading the week/15
Programming/21
Marketing/28
CableVision Plus/29
Advertising/53
Business/55
Government & Law/66
People/67
Events/69
Classifieds/70
Advertisers' Index/73
From New York/74
Cable stats/77
Parting words/80

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## TCI gains weight

Tele-Communications Inc. added to its subscriber base with the acquisition of Liberty Communications, the nation's 22nd largest MSO. **Leading the week, pages 15-18.**

## Cable forecast: heavy snow

Distant signal channels in systems serving more than 6 million cable subscribers will go blank when higher copyright royalty fees go into effect March 15, according to a National Cable Television Association survey. **Leading the week, pages 15-18.**

## Rogers UA partnership split

Rogers Cablesystems and United Artists Communications agree to part ways after 14 months and dissolve the Rogers UA Cablesystems MSO. Spokesmen for both companies say no enmity was involved in the split. Division of the MSO's systems between the two partners will be determined within the next two to six months. **Leading the week, pages 15-18.**

## 'Pirates' sales stall

*CableVision's* survey of several systems around the U.S. found penetration rates for Universal's *Pirates of Penzance* pay-per-view event Feb. 18 may range from 3 to 20 percent. Several major first-run movie theater owners say they won't run *Pirates* or any other movie that is simultaneously presented on cable. **Leading the week, pages 15-18.**

## Bewildering options

IRTS seminar panelists in Long Island last week said consumers don't understand the distinctions between pay-per-view, pay TV and basic cable. **Page 21.**

## TEC's marketing makeover

Acknowledging its high disconnect rate in key affiliate systems, The Entertainment Channel is revamping its rate card and mature sales and retention strategies, and offering a new pitch book, simplified promotional guide and a new starter kit. **Page 28.**

## Pooling their resources

Three Cleveland-area cable operators with systems passing 293,000 homes pooled $100,000 in co-op ad money to promote CHN, ESPN, USA and WTBS in a year-long local multimedia buying experiment. **Page 53.**

## The Dayton seven

A microwave interconnect between Continental and Viacom systems will reach 128,788 subscribers and provide local ad avails on CNN, ESPN, MTV, USA and CHN starting March 1. **Page 53.**

## In the public interest

NYU advanced students teach 22 nonprofit organizations how they can best use the new media. **Page 55.**

## HBO sells to hotel chain

Service to Marriott will start this fall. HBO reassures cable operators that the agreement in no way affects its policy against providing service to SMATV systems. **Page 58.**

## Who got CablePAC money

Federal candidates and political committees received $52,192 from the cable industry PAC. **Page 66.**

## Can you hear shouting?

Al Swift, a member of the House Telecommunications Subcommittee, tells N.Y. Cable Club members that congressional action to negate higher copyright royalty fees will depend in part on the extent of subscribers' protests. **Page 66.**

## About the cover

J. Arthur Kenefick's illustration conveys Madison Avenue's dilemma over cable, a technology that many in the advertising community once hailed in theory but not in practice.

## This week in PLUS

Now that its flowery rhetoric about cable advertising has subsided, Madison Avenue is taking a second look at the medium, and this time it's searching for facts and figures, not flights of fancy. How will cable hold up to this reweighing?. . . Gene Linder, ATC's executive director of programming, talks with *CableVision Plus* about his efforts on a community level and discusses the general programming concerns of a major MSO. . . The three major TV networks have appealed the FCC's syndication rights and franchise interest ruling, contending that the ruling gives pay networks an unfair advantage. Pay networks, on the other hand, argue that their ability to fund programming and to produce their own material is the only weapon they have that allows them to compete with the big three at all. **Pages 29-52.**

J. Arthur Kenefick

# MADISON AVENUE: TAKING INVENTORY

*Ad agencies re-evaluate cable—the talk now is numbers and deals, not revelation and revolution*

**By David Stoller**

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The high pitch of cable rhetoric by advertisers and ad agency executives reached its zenith at the beginning of 1982 when speakers at various conventions and in interviews began to describe the medium in religious and political terminology. Some called cable a "second coming"; others said it was a "revolution"; still others spoke of it as a "reincarnation."

During the previous two years the levels of rhetoric about cable advertising expanded like a helium balloon, until it seemed to some observers that agencies and advertisers were more enamored of their speechwriter's words than they were of the medium they were making all the speeches.

The facts were that cable advertising spending, while it increased from 1980 to 1982, never reached as high a level as the rhetoric did. Meanwhile, speech after speech proclaimed that cable advertising was going to change everything, from the way agencies and their clients interacted to the way the country as a whole reacted to advertising. But the tone of the speeches has changed since then.

A sense of realism about the medium and its potential now has replaced the once flowery flights of fancy that took over Madison Avenue during those early days. Now the talk is numbers, figures and deals, not revelation and revolution.

Jerry Della Femina, the infamous wisecracking ad genius, started the cable helium balloon toward the earth during a seminar on cable sponsored by the Advertising Club of New York in early 1982. "I know nothing about cable. I don't like it," Della Femina said. "I don't know why I'm here. I use it as a weapon against the network continuity departments. I say, I'll take it to Turner."

But men like Della Femina, who made their names and fortunes in broadcast television, were puncturing holes in the cable rhetorical balloon at the same time as other agency executives—some young, some not so young—saw cable for what it truly was: an opportunity to help their clients. Several agency executives from media departments staked their claims and made themselves famous by their use and understanding of cable, not only by their preaching.

The incorporation of cable at major agencies has resulted in a structural challenge. About half of the agencies established special new electronic media task forces or assigned a particular individual to "cover" the new television. These agencies include BBDO, Dancer Fitzgerald Sample, Ted Bates, Young & Rubicam, J. Walter Thompson, Foote Cone & Belding, McCann-Erickson, Compton, and Doyle Dane Bernbach. Other agencies, including N.W. Ayer, Benton & Bowles and SSC&B, have no special committees, but rely on their personnel to "be aware of" and to "understand" cable.

Still, at all the major agencies, one or two individuals have emerged as in-house cable experts. Among these cable mavens are Jay James, Doyle Dane Bernbach; Ron Kaatz, J. Walter Thompson; Arnie Semsky and Paul Green, BBDO; Ira Tumpowsky, Young & Rubicam; Beverly O'Malley, Dancer Fitzgerald Sample; Phil Guarascio, Benton & Bowles; Hadassa Gerber, McCann-Erickson; John Hunt, Ogilvy & Mather; Marcella Rosen, N.W. Ayer.

Other important agency names include Greg Blaine, Foote Cone & Belding; Joel Segal, Ted Bates; Jack Otter, SSC&B; Bill Cameron, Needham, Harper & Steers; Carol Karasick, Compton; Robert Geis, Wells Rich Greene; Ned Gelband, Della Femina, Travisano & Partners; Norm Varney and Garth Hallberg, J. Walter Thompson; Dick Simon, D'Arcy-MacManus & Masius; and Jayne Zenaty, Leo Burnett.

It is this knowledgeable group of ad executives whose choices and buys have made some networks winners and other losers. Their visions about cable have moved it from rhetoric to pragmatism.

## A second look

The loss of network share points, especially in cable and pay cable homes, is perhaps the single most important factor in the increasing acceptance and use of cable television by advertisers. Agencies that two years ago made beautiful pronouncements about cable's potential, but did not buy, are now making tightly lipped and unheralded purchases of the medium.

As agencies have moved away from their rhetoric, they have also moved away from trying to make fast and quick judgements about cable. They are looking at it for its inherent value.

This is both good and bad for

*Every major agency reports developments in special commercials and programs for the coming year. But if the economy doesn't pull out of the recession, these plans could be shelved.*

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## Major ad agency cable spending patterns 1980-1983

| Agency | Year 1980 | 1981 | 1982 | 1983 (estimated) |
|---|---|---|---|---|
| N.W. Ayer | N/A | $1,000,000 | $2,000,000 | $3,000,000 |
| Ted Bates | N/A | N/A | 3,200,000 | 4,500,000 |
| BBDO | $3,000,000 | 7,000,000 | 10,000,000 | N/A |
| Benton & Bowles | 2,000,000 | 4,000,000 | 8,000,000 | 8,200,000 |
| Compton | 1,500,000 | 3,000,000 | 6,500,000 | 8,000,000 |
| Dancer Fitzgerald Sample | 1,000,000 | 5,000,000 | 7,000,000 | 10,000,000 |
| Doyle Dane Bernbach | N/A | 3,500,000 | 7,000,000 | 14,000,000 |
| Foote Cone & Belding | 1,000,000 | 2,200,000 | 4,500,000 | 10,000,000 |
| Grey | 1,400,000 | 3,500,000 | 4,500,000 | 5,300,000 |
| Needham Harper & Steers | N/A | N/A | 3,000,000 | 3,300,000 |
| McCann Erickson | N/A | N/A | N/A | N/A |
| Ogilvy & Mather | N/A | 2,500,000 | 3,500,000 | 5,000,000 |
| J. Walter Thompson | N/A | 5,000,000 | 8,000,000 | 6,000,000* (committed as of 12/21/82) |
| SSC&B | N/A | 300,000 | 800,000 | 1,000,000 |
| Welles Rich Greene | N/A | 200,000 | 750,000 | 1,500,000-2,000,000 |
| Young & Rubicam | 6,000,000 | 12,000,000 | 22,000,000 | 25,000,000 |

cable. When cable was the darling of the industry, it could do no wrong, but it also wasn't being used that much. Now that the baby fat is melting from cable's flanks, it can no longer cry out that it is being treated unfairly or is not being looked at realistically. But with maturation comes responsibility.

Says Ron Kaatz, J. Walter Thompson senior vice president, "We talk about the value of getting in early, but it (cable) must be evaluated in the media process. Cable must offer an outstanding environment or efficiency—you don't just do it to do it."

The fact that cable has become the responsibility of agency media departments says a great deal about why the business has evolved the way it has. If the creative departments at agencies had taken full responsibility for developing cable usage patterns, things would be different. But for all intents and purposes, most agency creative departments are in the same place today that agency media departments were two years ago: spouting rhetoric in about the medium's creative potential.

Few infomercials and new commercials for cable have been produced. And while several cable-originated programs have been developed by agencies for their clients, these ideas have been hatched in media departments and in cable task forces, not in creative divisions.

### *Buying by the numbers*

Because cable has become the bailiwick of media executives, the interest in and importance of audience ratings numbers have been incorporated snugly into agency cable philosophies and buying patterns. During the heady days of 1980 and 1981, buys were made based on whatever statistical research was available. Often, this was pretty slim stuff. But as 1982 rolled around, this "seat of the pants" approach was just not enough.

In 1982, Madison Avenue began to forcibly ask cable for numbers. Then they began to scream—loudly. Almost like Kruschev at the United Nations, cable media buyers, speaking at cable advertising panels and in trade articles, pounded their shoes on the table demanding that cable produce significant audience research based on standard television models.

Another major factor in cable media policy since 1980 has been the economy. The poor economy over the past recessionary years in some cases has dried up funds earmarked for cable. Ironically, as the economy plummeted, the country's major commercial broadcast networks, which were already losing audiences to cable, dramatically increased their advertising rates. Still, media buyers, trained and weaned on broadcast televison for 30 years, continued to pay the price.

While agency executives had talked about creating "pools" of cable money at one time, the rising cost of broadcast rates forced them to admit that they were trimming and in some cases eliminating the amount allocated for cable.

But the facts were clear. Cable, and especially pay cable, was affecting audience delivery. Network shares were dropping in cable homes. And the only way to make up for that underdelivery was to buy the medium causing the problem—cable.

Now, the major agencies, including those that previously had dismissed cable, have come around to the opinion that cable must be bought, if only to shore up lost network deliveries. While this has affected much cable "experimentation," it has caused the medium to be used more frequently, and ultimately, may bring cable fully into creative and account departments at ad agencies as a completely complementary medium to broadcast television.

### *The 5 percent solution*

A veritable furor struck in 1981, when Ted Bates announced through Senior Vice President Walter Reichel that it would recommend that all clients place 5 percent of their broadcast budgets in WTBS and other "superstations" to make up for network audiences lost to cable homes. Even now, other

## Ad agencies—major cable clients and networks used

| Agency | Clients | Networks |
|---|---|---|
| N.W. Ayer | Seven-Up, General Motors, U.S. Army, DuPont, ATT ATT Long Lines | ARTS, C-SPAN, ESPN, CNN, WTBS, MTV |
| Ted Bates | General Foods, Panasonic (most clients have bought superstations) | CNN, CHN, MTV, ESPN, USA, WTBS |
| BBDO | Campbell's Soup, Del Monte, Firestone, Gillette, General Electric, Hormel, Pepsi, Wrigley, Pfizer, Dodge | CBN, CNN, BET, ESPN, MTV, WTBS, WEA, USA, SIN |
| Benton & Bowles | Procter & Gamble, General Foods, Richardson-Vicks Cella Wines, Redman Chewing Tobacco, Hardees, Texaco, Emory | CBN, CBS, CHN, ESPN, WTBS |
| Compton | American Motors, Johnson & Johnson, Procter & Gamble, Thompson Medical, National Enquirer, Paine Webber | CBN, CNN, ESPN, USA, WTBS |
| Dancer Fitzgerald Sample | Ciba-Geigy, Duracell, Ethan Allen, Florida Citrus Growers, General Mills, Hanes, Kenner, L'Eggs, Lifesafers, Parker Bros., Toyota, Wrangler | CHN, CNN, Daytime, ESPN, MTV, USA, WTBS, WEA |
| Doyle Dane Bernbach | Atari, Bulova, Celestial Seasonings, Chanel, Citicorp, GTE, IBM, Mobil, Ore-Ida, Polaroid, Stroh's, Universal Pictures, Volkswagen, Weight Watchers, O.M. Scott, Sherwin-Williams | ARTS, BET, CBN, CBS, CHN, CNN, Daytime ESPN, MTV, TeleFrance, USA, WTBS |
| Foote Cone & Belding | Clorox, Dole, Levy's, AM/PM Stores, Mazda, Sunkist Coors, Kraft, Sears, Swift, Armour-Dial | ESPN, CNN, USA |
| Grey | American Council of Life Insurance, Block Drugs, Borden, Carter Wallace, Dept. of Defense, Esmark, General Foods, Kenner, Mennen, Panasonic, Shearson/ American Express, STP, Timex, Warner-Bros., Canon | CNN 1 and 2, CBS, CHN, ESPN, MTV, SPN, WTBS, USA |
| McCann-Erickson | Coca-Cola, Lufthansa, Pabst, Nestle, New York Racing Association, Buick, Del Monte, GMC Trucks, Hilton, Georgia Pacific, Texas Instruments, Exxon, AT&T | CNN, CBN, ESPN, SNC, CHN, Daytime WTBS, USA |
| Needham, Harper & Steers | Shasta, Wrigley, General Mills, Xerox, Kraft, Honda, G.D. Searle, ITT | CBN, CNN, ESPN, Daytime, BET, CBS WTBS, SNC, USA |
| Ogilvy & Mather | American Express, British Rail, Campbell's, Ex Lax, General Foods, Kimberly-Clark, Hershey, Mattel, Winslow, Owens-Corning, Peugeot,Playtex, Shell, Smith Barney, TWA | CBN, CNN, Daytime, ESPN, USA |
| SSC&B | Noxell, Mennen, Lego Toys, Carnation | ESPN, MTV, SPN, WTBS, USA |
| J. Walter Thompson | Kraft, Quaker, Sears, Ford, Kodak, Warner-Lambert, Activision, Dunlop, Hyatt, Jovan, Kemper, Lever Bros., Champion, Raisinettes, Reynolds, Goodyear, IBM, National Education Association | CBS, CBN, CNN, CNN 2, BET, Daytime ARTS, SNC, CHN, SIN, Nickelodeon, ESPN, WTBS, WEA, MTV, USA |
| Wells Rich Greene | Procter & Gamble, Ford, Miles Labs, Chase, Pan Am, New York State | ESPN, CNN, WTBS |
| Young & Rubicam | General Foods, Johnson & Johnson, Merrill Lynch, Holiday Inns, Manufacturers Hanover, U.S. Postal Service, CBS Records, Gulf, 20th Century-Fox, Clorox, Ford, Lincoln-Mercury, Columbia Record Club | ARTS, BET, CBS, ESPN, CNN, MTV, WTBS, USA |

agency executives question Bates' strategy. Marcella Rosen of N.W. Ayer calls the idea of quotas for cable, or for any medium, "ridiculous," and no other major agency has adopted Bates "5 percent solution."

But Bates itself has stayed with the strategy. In fact, today it's the 6 percent solution, according to Reichel. He says all the agency's clients adopted the proposal to divert 6 percent of their 1982 budgets from network television into superstations and also into some cable-originated networks.

The Bates strategy is two-fold, according to Reichel; it is both opportunistic and defensive. Reichel sees opportunity in "exploiting" narrowcasting; but by and large, the largest portion of the agency's cable funds are funneled into the "defensive strategy" of diverting monies into superstations, because research has shown the majority of basic cable viewership is still going to distant signals.

To Marcella Rosen, however, cable is a "complex medium, not a blanket." N.W. Ayer, Rosen says, has bought cable as most of the major agencies have, on a client-by-client and brand-by-brand basis. For example, Ayer bought WTBS for one client because of its significant southwest coverage; for another client MTV was purchased for its "narrowcasting" potential. But unlike the Bates approach, Ayer has no across-the-board cable budget recommendation.

The Doyle Dane Bernbach strategy, according to Vice President Jay James, is to make an effort to put clients in cable where there is "any logic to doing it. If cable is not part of the media plan, there must be written reasons why."

According to Alec Gerster, senior vice president at Grey Advertising, the agency is not "for or against" any media type, including cable. Grey views cable in two ways, Gerster explains, for clients buying participations or "scatter" plans, "current value" is a prerequisite; the same "restraints" applied to any broadcast medium are applied to cable. For example, says Gerster, if the client is interested in sports, ESPN and an event on CBS will be judged by the same measurements. But for clients looking to use cable to deliver new messages or to deliver the same message in a new

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environment, Grey considers the environment the commercial will run in as well as the cost per thousand (CPM).

Grey's cable philosophy characterizes the challenge of cable advertising to agencies: how to evaluate the somewhat sparse audience numbers in relation to the new and unique environments cable offers. While this challenge is faced in all media buying, it is special to cable as a video medium. Broadcast television, with the exception of "special" programming like the Olympics, the World Series and the Superbowl, is bought primarily on a CPM basis. Audience size and general audience demographics rule the roost in broadcast media buying.

The cable numbers now available, especially from the Nielsen metering of WTBS, CNN, ESPN and CBN (the only four ad-supported cable networks now using autometers for research), are in no way comparable in size to the larger audiences attracted to even hum-drum broadcast television programs. So environment has become, in cable as it has been in magazines, just as important as rating points in assessing the value of a buy.

According to BBDO Executive Vice President Arnie Semsky, cable is now "mainstream." This new status gives the medium new advantages and also new disadvantages. In the short term, Semsky suggests there may be a "hangup" with CPM, but he adds that isn't the way BBDO buys cable. Buying cable for the numbers is the "easiest thing to do," Semsky says. BBDO was one of the first agencies to develop programing for cable. It also sought out franchise and product exclusivity agreements early on.

Searching for unique opportunities is also the approach of Jack Otter, senior vice president, SSC&B. "We attempt to search out opportunities in cable where our clients can benefit from program and editorial environments—opportunities they can't have in regular broadcasting." Otter cites as examples a buy for Noxell on the recently-debuted *Coed* program on USA Network to reach the elusive teenage market, and Mennen's sponsorship of ESPN's *Sports Update*.

## Getting a clear picture

The search for opportunities, the challenge of balancing environment and audience ratings, are leading agencies now to evaluate cable, in the words of Dancer Fitzgerald Sample Senior Vice President, Beverly O'Malley, "in terms of the total TV picture."

This is especially true in response to network share erosion, O'Malley said. She called cable an "important option" in combatting network share loss. However, DFS doesn't turn to cable first. Initially, the agency "fine tunes" its traditional network buys, purchasing "those programs, networks and dayparts that seem to suffer less erosion in cable households," says O'Malley. Then the agency buys independent stations, and lastly DFS buys "cable-originated" networks.

A similar "total picture" philosophy is pursued by Young & Rubicam, which reports that it spent $22 million in cable in 1982. According to Senior Vice President Ira Tumpowsky, "Our philosophy, in a single word, is participation—a strategy to combine long-term subscriber increases and position within a network at a fair market price."

The agencies have attempted to fill in the research gap on their own, while they wait for results of major industry-supported projects such as the NCTA-CAB CAMS report.

Ogilvy and Mather studied audience fragmentation levels in Tulsa in May 1981 and in May 1982. According to O&M's John Hunt, Tulsa is a "microcosm" of future television viewing habits. As more markets get 36-channel (and greater) capacity systems like Tulsa's, every channel, including broadcast channels delivered by cable systems, will be fighting for a smaller piece of the overall viewing pie. "On a 36-channel system, everybody's fighting," Hunt says. "The viewer's loyalty is to himself. Tulsa is not the exception, it will be the norm in 1990."

Ted Bates conducted research into commercial clearance at the local system level. Approximately 100 cable systems throughout the country were studied for three hours a day for five consecutive days.

According to Ted Bates Vice President Barry Kaplan, in only one instance was a scheduled cable network program pre-empted by a local system, and this was due to "technical difficulties" lasting only 20 minutes.

In total, the agency found only 15 commercial "discrepancies" out of a total of 4,604 commercials monitored. Of the 15 discrepancies, all occurred in only one network and 14 in only one system, Kaplan said.

The multi-client study by Young & Rubicam is another major research effort. It began in December 1981 and is still continuing. The major objective of the study was familiar—to find out the way in which cable buys in combination with broadcast network objectives would be met as efficiently as possible.

The agency did a series of special Nielsen and Arbriton tabulations. One portion of the Y&R study measured 21 age and sex demographics for the eight cable networks where diary sample sizes were large enough to provide data. Another area of study was psychographics and product usage. The agency eventually analyzed more than 100 cable network ad schedules, to report to each participating client on how their actual schedules did in achieving reach and frequency goals in pay cable, basic and non-cable homes. The agency hopes to develop a first-generation planning model based on the research.

## Commercial crop

1983 could be the year when the first really significant crop of cable original commercials is produced. Every major agency reports developments in special commercials and programs for the coming year. But one caveat remains: if the economy does not pull out of the recession, these plans could be shelved.

At one point in 1981 it appeared that agencies might "take over" cable network program development and return to the position of supremacy in program decision-making they briefly held in the early days of broadcast TV back in the 1950s. But that did not happen. The fact that agencies have learned to make money by purchasing 30- and 60-second spots in broadcast has influenced their readiness and willingness to risk program ventures in cable. They would prefer—for the most part—to continue to make money in the same way they have in the past, rather than risking additional dollars on unsure programming.

There have been agency created program successes, including Young & Rubicam's *Woman's Day USA* on USA Network, BBDO's *WomanWatch* on WTBS, and Doyle Dane Bernback's *Future Sport* on ESPN, and *Sportslook*, created three years ago by Foote Cone & Belding for Mazda on USA Network.■

## 1982 campaign contributions

| PAC sponsor | Amount donated to federal candidates, political committees |
|---|---|
| NCTA | $52,192 |
| NAB | $72,140 |
| MPAA | $21,150 |

Source: Federal Election Commission

# Who got CablePAC money

Federal candidates and political committees received $52,192 before and after November elections

WASHINGTON—CablePAC, the cable television industry's political action committee, contributed $52,192 to federal candidates and political committees in 1982, according to a report filed with the Federal Election Commission and released last week.

The industry contributed to more than 100 candidates seeking election or re-election to Congress. Most were winners in the November elections.

Richard Loftus, chairman of CablePAC and president of Trident Communications Group, views the campaign donations as another indication of the cable industry's growing involvement in the political arena.

"The contributions which were made were the largest in the history of CablePAC and that is encouraging," Loftus said. "We also think we had a pretty good average on our scoreboard. We ascertained the probability curve pretty highly. This is good because we think that the people to whom we contribute understand our position well. That's the criteria we attempt to establish when making contributions."

The campaign funds from cable were more than twice the $21,150 contributed by the Motion Picture Association of America's PAC in 1982. The National Association of Broadcasters Television and Radio PAC contributed about $20,000 more than CablePAC. None of these three association PACs is considered a major contributor, although together the three industries, which were joined for much of last year in an effort to attain copyright legislation, contributed more than $145,000.

Among the top recipients of CablePAC funds were House Telecommunications Subcommittee Chairman Tim Wirth (D-Colo.), $1,500 plus $1,429 in in-kind contributions representing goods and services which aid a campaign; House Copyright Subcommittee Chairman Robert Kastenmeier (D-Wis.), $1,500; House Energy and Commerce Chairman John Dingell (D-Mich.), $1,500 and $362 in-kind; Senate Minority Leader Robert Byrd (D-W. Va.), $1,000 and $876 in-kind;

*Richard Loftus*

Sen. Howard Cannon (D-Nev.), who lost, $2,500; and Rep. Al Swift (D-Wash.), $1,050.

PACs, which represent corporations, labor unions, trade groups or political causes, are allowed to contribute up to $5,000 to an individual per election. PACs are required to file public reports with the FEC itemizing all contributions to a candidate and any contibution of $200 or more made to the PAC. Contributions made to politicians after the November elections are usually to help pay off campaign debts.

Loftus sees CablePAC as an educational tool as well as a fundraising organization. It enhances cable's profile on Capitol Hill and gets operators involved in politics at the grassroots level, he said.

Most of the decisions regarding the campaign contributions are made by top officials of the National Cable Television Association. NCTA is planning to assign a staff member to coordinate CablePAC activities, according to Loftus. NCTA is encouraging state cable associations to start their own PACs.

*—Craig Leddy*

# Can you hear the shouting?

Swift says public protests to signal drops guide Congress to action on CRT rate hike

NEW YORK – Congressional action to negate the Copyright Royalty Tribunal's distant signal rate hike March 15—a day cable operators call "Black Tuesday"—will depend in part on the extent of subscribers' protests to systems that drop distant signals. So believes Al Swift, a member of the House Telecommunications Subcommittee.

"I don't know what, if anything, Congress is going to do," said Swift, the three-term House Democrat from Washington, at a meeting of New York Cable Club members here Feb. 4. "I think what it might do will largely depend on what consumer reaction grows out of the aftermath of (signal dropping)."

Swift suggested that the matter, if it comes up in the House, probably would be handled by the Judiciary Committee, which has jurisdiction over copyright law. But he cautioned that the Telecommunications Subcommittee and the Judiciary Committee currently have too little time in their agendas to effectively tackle the CRT's rate hike before next month's deadline.

In order to get Congress involved, he said, operators will probably have to drop signals quickly and keep them off. That, he said, is "the one thing that will make your subscribers most angry in order to be able to mobilize them... shortly after the pain has hit them."

Swift said operators should not wait too long to recruit subscribers for a Congressional lobbying campaign. "If you decide you want to play hardball, then you want to be able to move (quickly) on that motivation."

On a related issue, Swift declared the copyright compromise among cable, broadcast and motion picture organizations—one that failed to pass Congress last year—"dead... kept alive by machine."

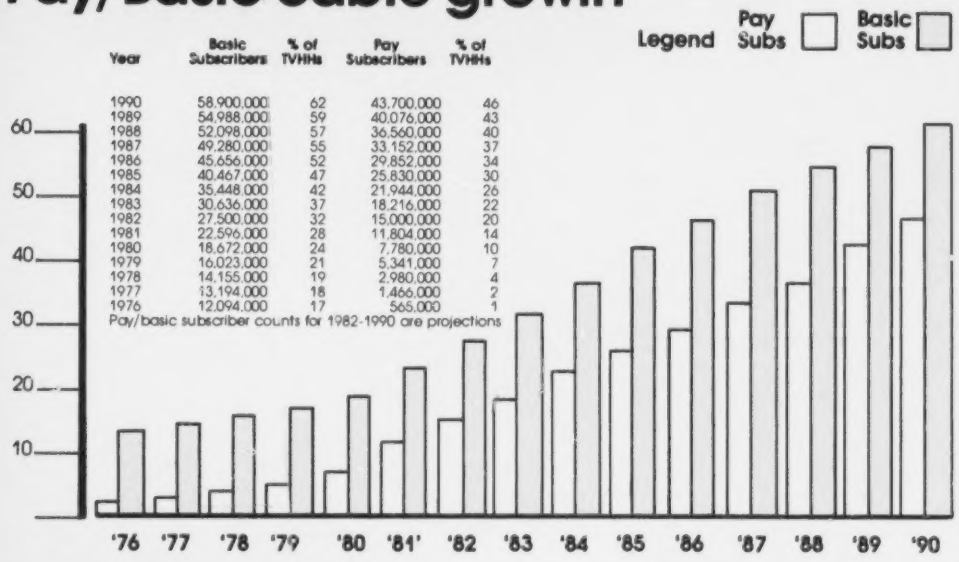
"I don't believe there is any member of Congress who wants to fool with it now, certainly not in the House, where many of us... paid our dues on that thing," he said. "I don't see any of the affected industries working very hard to recruit anybody to volunteer to take up that issue."

Swift said he regretted the outcome of copyright legislation last year, and hoped the cable industry, rather than Congress, would do more to resolve differences among broadcast and motion picture groups. "A compromise worked out within the industry is always going to be a more sophisticated compromise than one worked out by us, who never had as penetrating a knowledge of all the subtleties of the various problems as you had yourselves," Swift said.

*—Simon Applebaum*

# Cable stats

## Pay/Basic cable growth




| Year | Basic Subscribers | % of TVHHs | Pay Subscribers | % of TVHHs |
|---|---|---|---|---|
| 1990 | 58,900,000 | 62 | 43,700,000 | 46 |
| 1989 | 54,988,000 | 59 | 40,076,000 | 43 |
| 1988 | 52,098,000 | 57 | 36,560,000 | 40 |
| 1987 | 49,280,000 | 55 | 33,152,000 | 37 |
| 1986 | 45,656,000 | 52 | 29,852,000 | 34 |
| 1985 | 40,467,000 | 47 | 25,830,000 | 30 |
| 1984 | 35,448,000 | 42 | 21,944,000 | 26 |
| 1983 | 30,636,000 | 37 | 18,216,000 | 22 |
| 1982 | 27,500,000 | 32 | 15,000,000 | 20 |
| 1981 | 22,596,000 | 28 | 11,804,000 | 14 |
| 1980 | 18,672,000 | 24 | 7,780,000 | 10 |
| 1979 | 16,023,000 | 21 | 5,341,000 | 7 |
| 1978 | 14,155,000 | 19 | 2,980,000 | 4 |
| 1977 | 13,194,000 | 18 | 1,466,000 | 2 |
| 1976 | 12,094,000 | 17 | 565,000 | 1 |

Pay/basic subscriber counts for 1982-1990 are projections

### Cable barometer

Television households (TVHH) ..... 82,100,000
Homes passed by cable (HP) . 45,310,421
Percent of TVHH passed by cable ..... 55.2%
Basic cable subscribers .. 26,991,845
Percent of TVHH with basic cable ..... 32.9%
Percent of HP with basic cable ..... 59.6%
Pay cable units ..... 14,550,000
Percent of TVHH with pay cable ..... 17.7%
Percent of HP with pay cable ..... 32.1%
Percent of basic subs with pay cable .. 53.9%

Figures are as of October 1982

## Satellite lineup

### Satcom III-R (RCA Americom)

| | Transponder |
|---|---|
| Warner Amex (Nickelodeon/ARTS) | 1 |
| PTL Satellite Network | 2 |
| United Video (WGN, WFMT, Lifestyle, Dow Jones, EPG) | 3 |
| Times Mirror for Spotlight | 4 |
| Warner Amex (The Movie Channel) | 5 |
| Southern Satellite Systems (WTBS, Cabletext, Reuters News View, North American Newstime/The Travel Channel, Dow Jones Cable News) | 6 |
| ESPN | 7 |
| CBN Cable Network | 8 |
| USA Network | 9 |
| Showtime (west) | 10 |
| Warner Amex (MTV: Music Television) | 11 |
| Showtime (east) | 12 |
| HBO (Cinemax-west) | 13 |
| Cable News Network | 14 |
| Warner Amex owned (for CNN Headline News) | 15 |
| ACSN, National Jewish Television, HTN Plus | 16 |
| Cable Health Network | 17 |
| Reuters, Eternal Word Television Network (8 p.m.-12 a.m.) | 18 |
| C-SPAN | 19 |
| HBO (east) | 20 |
| Landmark/The Weather Channel | 21 |
| HBO/Modern Satellite Network, leased for Daytime | 22 |
| HBO (west) | 23 |
| HBO (Cinemax-east) | 24 |

### Satcom IV (RCA Americom)

| | Transponder |
|---|---|
| SIN | 1 |
| FNN | 2 |
| SPN | 3 |
| Warner Amex | 4 |
| ESPN (subleased to Bravo) | 6 |
| National Christian Network daytime hours/Playboy Channel evenings | 7 |
| RCTV (The Entertainment Channel) | 8 |
| Warner Amex | 11 |
| Viacom International (U.S. Chamber of Commerce, BIZNET) | 15 |
| Trinity Broadcasting | 17 |
| HBO (Time Inc. teletext) | 18 |
| The American Network | 19 |
| GalaVision | 23 |

**Satcom V**—launched 4th quarter 1982; no cable.
**Satcom I-R**—Projected launch March 1983
**Satcom II-R**—Projected launch December 1983

### Westar IV (Western Union)

| | Transponder |
|---|---|
| Hughes Television Network | 1D/1X |
| Bonneville Satellite | 3D |
| AmSat (leased to Wold Communications) | 5D |
| AmSat (digital traffic) | 6X |
| Wold Communications | 6D |
| AmSat (digital traffic) | 7D |
| Cable News Network | 8X |
| Wold Communications—SelecTV | 9X |
| Wold Communications—EROS | 10D |
| Bonneville Satellite | 12X |
| PBS (leased to Bonneville) | 12D |

### Westar V (Western Union)

| | Transponder |
|---|---|
| Hughes Television Network | 1D |
| WOR (leased by Wold) | 2D |
| Dow Jones/UTV Cable Network | 2X |
| Citicorp | 3D |
| Satellite News Channel I | 4X |
| AmSat/TCI (Hughes Television) | 5D |
| AmSat (leased by Wold)/Disney | 5X |
| Satellite News Channel I | 6D |
| AmSat (leased by Wold)/Disney | 6X |
| AmSat/DCM | 7D |
| Satellite News Channel I | 7X |
| Satellite News Channel II | 8D |
| Satellite News Channel I | 8X |
| Nashville Network | 9D |
| Satellite News Channel I | 9X |
| Citicorp | 10D |
| Group W Satellite Corp. (east) | 11D |
| Digital Communications Corp. | 11X |
| Group W Satellite Corp. (east) | 12D |
| BET | 12X |

**Galaxy I** (Hughes Communications)—Projected launch June 1983, 24 transponders, 4/6 GHz. Transponders reserved: Time Inc. (6), Westinghouse (4), Turner Broadcasting (2), Times Mirror (2), Viacom (2), SIN (2), C-SPAN (1).
**Galaxy II**—Projected launch September 1983, 24 transponders, 4/6 GHz.
**Galaxy III**—Projected launch summer 1984, 24 transponders, 4/6 GHz.

**Spacenet I** (Southern Pacific Satellite Co.)—Projected launch April 1984, 18 transponders-4/6 GHz, 6 transponders-12/14 GHz. Transponders reserved: SSS (3), Pop Network (3), SIN (1½), Landmark Communications (1), Bonneville International (2½), Southern Baptist Convention (2), United Video (1), Midwest Communications (1), Double-B Enterprises (1), Rainbow Communications (1), NBC (1), Cox Communications (1), Bitalink (½), Southern Pacific Communications (3½).
**Spacenet II**—Projected launch August 1984, 18 transponders-4/6 GHz, 6 transponders-12/14 GHz.
**Spacenet III**—presently being built.

# Top 100 MSOs

| Rank | Multiple System Operator | Basic Subs | |
|---|---|---|---|
| 1. | Tele-Communications Inc.[1] | 2,255,000 | |
| 2. | American Television and Communications | 2,104,705 | |
| 3. | Group W Cable | 1,838,922 | |
| 4. | Cox Cable Communications | 1,290,880 | |
| 5. | Warner Amex Cable Communications | 1,200,000 | |
| 6. | Storer Cable Communications | 1,163,187 | |
| 7. | Times Mirror Cable Television | 792,719 | |
| 8. | Rogers-UA Cablesystems | 705,266 | |
| 9. | Newhouse Broadcasting[2] | 683,327 | |
| 10. | Continental Cablevision | 619,000 | |
| 11. | Viacom Cablevision | 609,907 | |
| 12. | United Cable Television Corp. | 538,830 | |
| 13. | Sammons Communications Inc. | 522,448 | |
| 14. | TeleCable Corp. | 382,009 | |
| 15. | Capital Cities Cable Inc. | 314,283 | (11/82) |
| 16. | General Electric Cable | 306,000 | |
| 17. | Cablevision Systems Development | 283,000 | |
| 18. | Comcast Cable Communications | 283,000 | |
| 19. | Heritage Communications Group | 271,864 | |
| 20. | Jones Intercable Inc. | 240,711 | (1/83) |
| 21. | Liberty Communications | 238,790 | |
| 22. | Wometco Communications | 229,000 | |
| 23. | Tele-Media Corp. | 223,600 | |
| 24. | TCA Group | 214,623 | |
| 25. | Multimedia Cablevision Inc.[3] | 195,641 | |
| 26. | Maclean Hunter Cable TV Ltd. | 190,947 | |
| 27. | Service Electric Cable TV | 189,500 | |
| 28. | Daniels & Associates Inc. | 183,532 | (10/82) |
| 29. | Century Communications Corp. | 183,000 | |
| 30. | Colony Communications Inc. | 168,169 | (10/82) |
| 31. | Western Communications | 152,555 | |
| 32. | Centel Cable Television | 149,296 | (1/83) |
| 33. | Prime Cable Corp. | 141,334 | |
| 34. | Harris Cable Corp. | 140,400 | |
| 35. | Tribune Cable Communications | 131,119 | |
| 36. | Rollins Cable Vue Inc. | 127,500 | |
| 37. | Midwest Video Corp. | 114,615 | (12/81) |
| 38. | Communications Service Inc. | 110,000 | (8/81) |
| 39. | Harron Communications | 106,987 | (10/82) |
| 40. | Midcontinent Cable Systems[4] | 101,968 | |
| 41. | McCaw Communications | 101,500 | |
| 42. | Cable Vision Industries | 101,453 | |
| 43. | Cable America | 99,600 | |
| 44. | Buckeye Cablevision | 96,053 | |
| 45. | Sutton Capital Group[5] | 93,957 | |
| 46. | Adams-Russell Telecommunications | 93,115 | |
| 47. | Communications Systems Inc. | 91,592 | |
| 48. | Armstrong Utilities | 86,849 | |
| 49. | Multi-Channel TV Cable Co. | 84,000 | (9/82) |
| 50. | McDonald Group | 82,072 | |
| 51. | American Cablesystems Inc. | 80,760 | |
| 52. | Southmedia Company | 78,668 | (9/82) |
| 53. | Cablentertainment Inc. | 78,582 | (10/82) |
| 54. | Omni Cable TV Corp. | 78,099 | (9/82) |
| 55. | Buford Television | 76,653 | (7/82) |
| 56. | King Videocable Co. | 74,523 | |
| 57. | Televents Inc. | 73,532 | (7/82) |
| 58. | Perry Cable TV Corp. | 73,525 | |
| 59. | Palmer Communications Inc. | 72,642 | |
| 60. | Summit Communications | 71,650 | |
| 61. | National Telecommunications Co. | 67,500 | |
| 62. | The Essex Group | 67,446 | (1/83) |
| 63. | McClatchy Newspapers | 64,078 | (7/82) |
| 64. | Acton Corporation | 63,040 | |
| 65. | Ultracom, Inc. | 62,822 | |
| 66. | WEHCO Video Inc. | 62,554 | (9/82) |
| 67. | Omega Communications | 60,000 | |
| 68. | American Cable TV (Phoenix, Ariz.) | 59,732 | (1/83) |
| 69. | Pencor Services Inc. | 56,853 | |
| 70. | Total TV Inc. | 56,217 | (1/83) |
| 71. | Booth Communications | 56,112 | (9/82) |
| 72. | US Cable Corp. | 55,273 | (6/82) |
| 73. | Harte-Hanks Communications | 53,000 | (6/82) |
| 74. | Consolidated Cable Systems | 51,900 | (7/82) |
| 75. | Marsh Media | 50,772 | (1/83) |
| 76. | Falcon Communications | 50,000 | (9/82) |
| 77. | The Daily Press | 49,000 | (1/83) |
| 78. | Clear TV Cable Corp. | 47,532 | (10/82) |
| 79. | Lenfest Group | 45,801 | |
| 80. | Adelphia Communications | 44,395 | |
| 81. | Sonic Cable TV | 43,995 | (7/82) |
| 82. | Greater Media | 43,500 | (1/83) |
| 83. | Susquehanna Broadcasting | 40,500 | (7/82) |
| 84. | National Cablesystems Inc. | 39,713 | (1/83) |
| 85. | Selkirk Communications | 39,380 | (10/82) |
| 86. | Combined Cable Corp. | 35,000 | (1/83) |
| 87. | Matrix Enterprises | 33,867 | |
| 88. | Joseph S. Gans | 33,300 | (3/82) |
| 89. | United Video Management | 30,800 | (1/83) |
| 90. | Cable Holdings Inc. | 30,000 | |
| 91. | Southern Cablevision | 29,138 | (8/82) |
| 92. | Columbia Communications | 28,586 | (8/82) |
| 93. | Hellicon Corp. | 28,500 | (1/83) |
| 94. | Mid America Media | 27,903 | |
| 95. | Jim R. Smith & Co. | 27,457 | (6/82) |
| 96. | Mickelson Media | 26,763 | |
| 97. | The LBJ Company | 26,717 | (8/82) |
| 98. | Cable Communications of Iowa | 26,483 | (9/82) |
| 99. | United Broadcasting | 25,440 | (9/82) |
| 100. | MultiVision Group | 24,694 | (9/82) |

[1] Number is a company estimate.
[2] Includes MetroVision, NewChannels, Vision Cable.
[3] Includes Tar River Communications.
[4] Includes systems owned and with controlling interest.
[5] Includes owned and partially owned systems.
**Note:** All subscriber counts are as of 12/82 unless noted otherwise.

# Top 100 systems

| Rank | Location | Operator | Basic Subs | |
|---|---|---|---|---|
| 1. | San Diego, Calif. | Cox Cable | 220,836 | (10/82) |
| 2. | Woodbury (Long Island), N.Y. | Cablevision | 180,480 | |
| 3. | Manhattan, N.Y. | ATC | 169,250 | |
| 4. | Houston, Texas[1] | Warner Amex | 151,350 | |
| 5. | West Orange, N.J. | MacLean Hunter | 145,291 | |
| 6. | San Antonio, Texas | Rogers-UA Cable | 145,196 | |
| 7. | Wayne, N.J. | Rogers-UA Cable | 113,958 | |
| 8. | Tulsa, Okla. | United Cable | 103,374 | |
| 9. | Audubon, N.J. | NYT Cable | 98,490 | |
| 10. | Erie County, N.Y. | Prime Cable | 97,733 | |
| 11. | Austin, Texas | ATC | 97,300 | |
| 12. | San Jose, Calif. | Gill Industries | 94,000 | |
| 13. | Tidewater, Va. | Cox Cable | 89,288 | (10/82) |
| 14. | Central Islip, (Long Island) N.Y. | Viacom | 84,937 | |
| 15. | Orlando, Fla. | ATC | 82,550 | |
| 16. | Seattle, Wash. | Group W Cable | 81,962 | |
| 17. | Jefferson Parish/Kenner, La. | Cox Cable | 80,160 | (10/82) |
| 18. | Baltimore County, Md. | Cultec Cable | 79,496 | |
| 19. | Cincinnati area, Ohio | Warner Amex | 78,800 | |
| 20. | Memphis, Tenn. | ATC | 78,025 | |
| 21. | Toledo, Ohio | Buckeye Cablevision | 77,348 | |
| 22. | Manhattan, N.Y. | Group W | 76,636 | |
| 23. | Grand Rapids, Mich. | General Electric | 75,000 | |
| 24. | Honolulu, Hawaii | ATC | 73,650 | |
| 25. | Jacksonville, Fla. | ATC | 72,975 | |
| 26. | San Diego, Calif. | ATC | 72,350 | |
| 27. | Wilmington, Del. | Rollins Cable | 72,300 | |
| 28. | Wichita, Kan. | Multimedia Cable | 68,047 | |
| 29. | San Francisco, Calif. | Viacom | 66,732 | |
| 30. | Greater San Juan, Puerto Rico | Harris Cable | 64,110 | |
| 31. | Flint, Mich. | Comcast | 63,000 | |
| 32. | Baton Rouge, La. | Daniels | 62,579 | (10/82) |
| 33. | Suburban Rochester, N.Y. | People's Cable | 62,000 | |
| 34. | Columbus, Ohio | Warner Amex | 60,700 | |
| 35. | Santa Barbara, Calif. | Cox Cable | 59,363 | (10/82) |
| 36. | Englewood, Colo. | United Cable | 59,075 | |
| 37. | Melbourne, Fla. | ATC | 58,925 | |
| 38. | Buffalo, N.Y. | Minneapolis Star | 58,844 | (1/83) |
| 39. | Monterey, Calif. | Western | 58,751 | |
| 40. | Seattle, Wash. | Viacom | 58,052 | |
| 41. | Pittsburgh, Pa. | Warner Amex | 58,000 | |
| 42. | Santa Monica, Calif. | Group W | 55,632 | (1/83) |
| 43. | Allentown, Pa. | Twin County Cable | 55,000 | |
| 44. | Snohomish County, Wash. | Viacom | 54,971 | |
| 45. | Columbus, Ohio | Coaxial Comm. | 54,064 | |
| 46. | Akron, Ohio | Warner Amex | 53,850 | |
| 47. | El Paso, Texas | Group W Cable | 53,600 | |
| 48. | Louisville, Ky. | Times Mirror | 52,731 | |
| 49. | Binghamton, N.Y. | NewChannels | 52,515 | |
| 50. | Harrisburg, Pa. | Sammons | 53,137 | |
| 51. | Charlotte, N.C. | ATC | 52,350 | |
| 52. | Dade/Broward counties, Fla. | Storer | 52,217 | |
| 53. | Tacoma, Wash. | Cable TV of Puget Sound | 52,000 | (1/83) |
| 54. | Boston Complex, Mass. | Warner Amex | 51,750 | |
| 55. | Kansas City, Mo. | ATC | 51,525 | |
| 56. | Jefferson County, Ky. | Storer | 51,266 | |
| 57. | Allentown, Pa. | Service Electric | 51,000 | |
| 58. | Des Moines, Iowa | Heritage | 50,621 | |
| 59. | Sarasota, Fla. | Storer | 50,556 | |
| 60. | Canton, Ohio | Warner Amex | 50,225 | |
| 61. | Escondido (San Diego County), Calif. | Times Mirror | 49,507 | |
| 62. | Hartford, Conn. | Times Mirror | 49,482 | |
| 63. | Pompano Beach, Fla. | American Cable TV | 49,257 | (10/82) |
| 64. | Charleston, S.C. | Storer | 49,028 | |
| 65. | New Haven, Conn. | Storer | 48,591 | |
| 66. | Reading, Pa. | ATC | 47,900 | |
| 67. | Port Arthur, Texas | Liberty | 47,155 | |
| 68. | Cleveland, Ohio | Viacom | 46,997 | |
| 69. | Peoria, Ill. | General Electric | 46,700 | |
| 70. | St. Petersburg, Fla. | Group W | 46,325 | |
| 71. | San Rafael/Marin County, Calif. | Viacom | 45,867 | |
| 72. | Jackson, Miss. | ATC | 45,850 | |
| 73. | Shreveport, La. | ATC | 45,700 | |
| 74. | Eugene, Ore. | Group W Cable | 44,949 | (1/83) |
| 75. | New Britain, Conn. | United Cable | 44,820 | |
| 76. | Albany, N.Y. | ATC | 44,525 | |
| 77. | Bakersfield/Kern Co., Calif. | Warner Amex | 43,525 | |
| 78. | Bridgeport, Conn. | Southern Conn. Cable | 43,500 | |
| 79. | Dallas Complex, Texas | Warner Amex | 43,250 | |
| 80. | Birmingham, Ala. | ATC | 42,950 | |
| 81. | Overland Park, Kan. | TeleCable | 42,741 | |
| 82. | Lincoln, Neb. | MetroVision | 42,296 | |
| 83. | Spokane, Wash. | Cox Cable | 42,196 | (10/82) |
| 84. | Lansing, Mich. | Continental | 42,000 | |
| 85. | Moline/Quint Cities, Ill. | Cox Cable | 41,910 | (10/82) |
| 86. | Scranton, Pa. | Verto Cable | 41,815 | (8/82) |
| 87. | Westchester County, N.Y. | Rogers UA Cable | 41,669 | |
| 88. | Chattanooga, Tenn. | South Media | 41,655 | (6/82) |
| 89. | Brookhaven(Long Island), N.Y. | Rogers-UA Cable | 41,574 | |
| 90. | Winston-Salem, N.C. | Summit Communications | 41,444 | |
| 91. | Concord, Calif. | Western | 41,312 | |
| 92. | Branford, Conn. | Rollins Cable | 40,900 | |
| 93. | Albuquerque, N.M. | Tribune Cable | 40,830 | (1/83) |
| 94. | Fayetteville, N.C. | ATC | 40,350 | |
| 95. | Oklahoma City, Okla. | Cox Cable | 39,258 | (10/82) |
| 96. | Atlanta, Ga. | Cable America | 39,256 | |
| 97. | DeKalb County, Ga. | Cable America | 39,183 | |
| 98. | Springfield, Ill. | Times Mirror | 38,933 | |
| 99. | Honolulu, Hawaii | TV Systems Inc. | 38,510 | (1/83) |
| 100. | Greenville, S.C. | TeleCable | 37,665 | |

[1] Includes Gulf Coast Cable.